CHAPTER 1

Reviewing Awards

This chapter lists common elements and discusses how to:

• Review award activity.
• Review aggregate aid.
• Review student packaging status by date.
• Review award summary information by category.
• Review total award summary information.
• Review anticipated aid.
• Expire anticipated aid.
• Review overaward amounts.

Common Elements Used in This Chapter

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted</td>
<td>Displays the award amount accepted by the student.</td>
</tr>
<tr>
<td>Authorized</td>
<td>Displays the amount authorized for disbursement to the student.</td>
</tr>
<tr>
<td>Disbursed</td>
<td>Displays the amount disbursed to the student.</td>
</tr>
<tr>
<td>Disbursement ID</td>
<td>Displays the disbursement ID associated with this award amount.</td>
</tr>
<tr>
<td>Disbursement Plan</td>
<td>Displays the disbursement plan associated with the award.</td>
</tr>
<tr>
<td>Item Type</td>
<td>Displays the financial aid item type of the award.</td>
</tr>
<tr>
<td>Offered</td>
<td>Displays the award amount offered to the student.</td>
</tr>
<tr>
<td>* = Expired</td>
<td>An asterisk next to a net award amount indicates that the amount can no longer be applied as anticipated aid because it has expired. These awards no longer show as anticipated aid in PeopleSoft Enterprise Student Financials.</td>
</tr>
</tbody>
</table>

Reviewing Award Activity

As financial aid is packaged, adjusted, and disbursed, all activity associated with those actions is recorded. Use the Award Activity page to review changes to a student’s financial aid package.

This section discusses how to review FA Term data.
Reviewing Awards

Chapter 1

Pages Used to Review Award Activity

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Activity</td>
<td>STDNT_AWRD_ACTV</td>
<td>Financial Aid, Awards, View</td>
<td>Review changes to a student’s award by financial aid item type.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Award Activity, Award</td>
<td></td>
</tr>
<tr>
<td>Award Detail</td>
<td>STDNT_AWD_ACTV_DET</td>
<td>Click the Award Detail link</td>
<td>View more information about the student’s award and the action reason, as well as cost of attendance information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>on the Award Activity page.</td>
<td></td>
</tr>
<tr>
<td>FA Term Data</td>
<td>STDNT_ACTV_TRM_SEC</td>
<td>Click the Term Detail button</td>
<td>Review the FA Term data that is used to award the financial aid item type to the student.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>on the Award Detail page.</td>
<td></td>
</tr>
</tbody>
</table>

Reviewing FA Term Data

Access the FA Term Data page (click the Term Detail button on the Award Detail page).

**Academic Year**
- Displays the academic year associated with the term.

**Total Units**
- Displays the total number of units that the student is taking for the term.

**Pell Term COA (Pell term cost of attendance)**
- Displays the term-based Pell COA by career.

The other fields on this page are the same as those on the Term Summary page.

**See Also**
- lsfa, Awarding and Packaging Students, Awarding Online, Viewing Term Summary Information

Reviewing Aggregate Aid

This section provides an overview of aggregate aid review and discusses how to:

- Review aggregate aid summary.
- Review aggregate aid by school.
- View aggregate detail.
- Review aggregate program summary.

**See Also**
- lsfa, Preparing for Awarding and Packaging, Managing Aggregate Aid
**Understanding Aggregate Aid Review**

The aggregate aid summary components display information regarding defined aggregate area limit amounts, used amounts against the limits, and remaining eligibility. Two aggregate aid summary components are available: View Aggregate Aid and View Aggregate Program Summary. Each is based on aggregate areas that you set up in the system. You can define aggregate area rules for each academic grade level, for undergraduate and graduate designation, or as lifetime funding limits. An aggregate area can be attached to one or many financial aid item types or awards. Information maintained in the aggregate aid tables helps determine a student’s annual and lifetime limits during the Awarding and Packaging processes. The aggregate aid summary components are updated by the Awarding and Packaging processes. You can also update individual aggregate data using the Update Incoming Aggregate Aid component.

Another source of aggregate aid history for the federal Stafford subsidized, Stafford unsubsidized, Perkins, Pell, and (Federal) Student Education Opportunity Grant (SEOG) aid programs is maintained within the National Student Loan Data System (NSLDS) database. NSLDS data is loaded into the PeopleSoft system during the Institutional Student Information Records (ISIR) Load routine as well as from Transfer Student Monitoring and Financial Aid History requests. NSLDS data that is loaded into the system can be pushed to the aggregate aid tables to be used during the Awarding and Packaging processes. An aggregate source of NSLDS must be set in the system to direct the Awarding and Packaging processes to use the NSLDS totals instead of the standard aggregate aid totals.

In addition to using aggregates to keep track of federal funds, you can establish aggregate areas and aggregate limits for any other award sources in the system. You should establish aggregate limits for all federal funds, such as Pell, Stafford, and SEOG. If aggregate limits are not established, the Packaging and Awarding processes may award students more than the federally or institutionally established annual and lifetime limits.

**Pages Used to Review Aggregate Aid**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aggregate Summary</td>
<td>STDNT_AGGR_AWDS</td>
<td>Financial Aid, Awards, Aggregates, View Aggregate Aid, Aggregate Summary</td>
<td>Review aggregate aid summary for a student.</td>
</tr>
<tr>
<td>Aggregates by School</td>
<td>STDNT_AGGR_SCHL</td>
<td>Financial Aid, Awards, Aggregates, View Aggregate Aid, Aggregates by School</td>
<td>Review aggregate aid by school. Check whether aggregate aid from a particular institution has been entered or whether the student has received aggregate aid from more than on institution.</td>
</tr>
<tr>
<td>Aggregate Detail</td>
<td>AGGR_SCHL_SEC</td>
<td>Click the Detail link on the Aggregates by School page.</td>
<td>View additional details of each institution’s aggregate aid award to the student, including loan information.</td>
</tr>
<tr>
<td>Aggregate Program Summary</td>
<td>SFA_STU_AGGR_PROG</td>
<td>Financial Aid, Awards, Aggregates, View Aggregate Program Summary, Aggregate Program Summary</td>
<td>View aggregate aid history for a student for a corresponding aggregate program.</td>
</tr>
</tbody>
</table>
Reviewing Aggregate Aid Summary

Access the Aggregate Summary page (Financial Aid, Awards, Aggregates, View Aggregate Aid, Aggregate Summary).

**Bundle 13 / Bundle 20**
Total % Used field added. The system populates this field when it awards Pell Grants.

**READ THIS!**

Prior to your implementation of this bundle, it is imperative that you read the Enhancements to Pell Grant Administration guide document included in this bundle documentation. This document provides suggested steps for implementation, consolidates information, and provides references to updated chapters in the Financial Aid PeopleBook that will assist you with your implementation.

### Aggregate Summary page

<table>
<thead>
<tr>
<th>Aggregate Summary</th>
<th>Aggregates by School</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jelena Williams</td>
<td>FAPKPEL0007</td>
</tr>
</tbody>
</table>

### Lifetime Total

<table>
<thead>
<tr>
<th>Lifetime Total</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Aid Year</td>
<td>2010</td>
</tr>
<tr>
<td>NSLDS Total</td>
<td>0.00</td>
</tr>
<tr>
<td>Limit</td>
<td>Used</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>0.00</td>
</tr>
<tr>
<td>Graduate</td>
<td>0.00</td>
</tr>
<tr>
<td>Term Count</td>
<td>0</td>
</tr>
</tbody>
</table>

### Level Totals by Aid Year

<table>
<thead>
<tr>
<th>Aggregate Level</th>
<th>Limit</th>
<th>Used</th>
<th>Remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>U1</td>
<td>5,350</td>
<td>4,800.00</td>
<td>550.00</td>
</tr>
</tbody>
</table>

### Lifetime Total

- **Aid Year**
  Indicates the aid year that corresponds to the displayed information. Use the scroll arrows to view aggregate aid made in other aid years.

- **NSLDS Total** (National Student Loan Data System total)
  Indicates the NSLDS total that has been loaded and pushed from the NSLDS tables.

- **Total % Used**
  Displays the sum of Percent Scheduled Used and the percent of Pell Grant awards already packaged by the system for the aid year. Valid values are 000.0 to 200.0.

- **Undergrad Lifetime** (undergraduate lifetime)
  Information in this row is for the student’s undergraduate NSLDS loan years (U0-U5) and associated awards.
Chapter 1 Reviewing Awards

**Graduate Lifetime**

Information in this row is for the student’s graduate NSLDS loan years (G1–G4, P1–P4) and associated awards. The student’s undergraduate loan year awards may also be included in this row, depending on whether the aggregate area has cumulative or distinct lifetime limits.

*(Cumulative)*: The student’s undergraduate amount of this aggregate aid is counted towards the graduate limit.

*(Distinct)*: The undergraduate and graduate limits are tracked separately.

**Lifetime Terms**

If a limit applies to the number of terms that a student can receive this type of aid, in addition to or separate from a dollar amount limit, this row displays the limit (if any) and the number of terms for which the student has received the award. The Packaging routine does not enforce these lifetime term limits; these fields are for informational purposes only.

- **Limit**
  - The lifetime maximum aggregate amount (or number of terms) the student can receive for this aggregate area/aid.
- **Used**
  - The amount of aid or number of terms that the student has received this type of aggregate aid.
- **Remaining**
  - Indicates unused lifetime aggregate eligibility (amount or terms) that the student can receive.

**Bundle 13 / Bundle 20**

Added “Financial Aid, Awards, Aggregates, Update Incoming Aggregates, Aggregate Aid Data” cross reference.

See Financial Aid, Awards, Aggregates, Update Incoming Aggregates, Aggregate Aid Data

**Level Totals by Aid Year**

- **Aggregate Level**
  - Displays the student’s aggregate level for the displayed year. Aggregate level data is posted as a result of Awarding and Packaging processing as well as data entered in the Update Incoming Aggregate Aid component.
- **Limit**
  - Displays the annual maximum aggregate amount that the student can receive for this aggregate level.
- **Used**
  - Displays the amount that the student has received.
- **Remaining**
  - Displays the unused annual aggregate eligibility that the student can receive.
- **Cumulative Limit**
  - Displays the maximum cumulative amount that the student can receive for this academic level. This is an optional limitation that can be defined on the corresponding aggregate area.
- **Cumulative Used**
  - Displays the unused cumulative level limit for which the student is eligible.
- **Dependency**
  - The student’s dependency status appears after any awarding or packaging activity has occurred for this aggregate area as of the aid year.
- **PLUS Override (Parent Loan for Undergraduate Students override)**
  - The student’s PLUS override status maintained on the STDNT_AID_PACKAGE component appears for all aggregate areas that correspond to either the Federal Family Educational Loan Program (FFELP) or Direct Loan programs. PLUS Override status appears after any awarding or packaging activity has occurred.
### Reviewing Aggregate Aid by School

Access the Aggregates by School page (Financial Aid, Awards, Aggregates, View Aggregate Aid, Aggregates by School).

<table>
<thead>
<tr>
<th>Aggregate Area</th>
<th>School Code</th>
<th>Description</th>
<th>Award Amount</th>
<th>Scheduled</th>
</tr>
</thead>
<tbody>
<tr>
<td>PELL</td>
<td>001315</td>
<td>UNIVERSITY OF CALIFORNIA (UCLA)</td>
<td>3750.00</td>
<td>3750.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>3750.00</td>
<td>3750.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>433.00</td>
<td>433.00</td>
</tr>
</tbody>
</table>

### Aggregates by School page

Information for this page is viewed by aggregate area, such as Stafford or Pell. Use the scroll arrows to view other aggregate areas.

**Total**

Displays the total lifetime amount awarded by all schools for this student for this aggregate area.

**Scheduled**

Displays the aggregate Pell amount award to the student. For non-Pell aggregate areas, this field remains at zero.

**Aid Year**

Displays the aid year in which the aggregate aid was awarded to the student. Use the scroll arrows to view additional aid years.

**Status**

Indicates whether your institution or another institution awarded the aggregate aid. Values are:

- **Internal**: The aggregate aid was awarded by your institution by means of the award entry pages.
- **Imported**: The aggregate aid was awarded at another institution and has been added to the system by means of the Aggregate Aid Data page.

**School Code**

Displays the code and name of the institution where the aggregate aid was awarded.

**Award Amount**

Displays the amount of aggregate aid provided by each school.

**Scheduled**

Displays the aggregate Pell amount award to the student for the corresponding aid year. For non-Pell aggregate areas, this field remains at zero.

**Detail**

Click this link to access the Aggregate Detail page and view detailed information about each school’s aggregate aid award.

### Viewing Aggregate Detail

Access the Aggregate Detail page (click the Detail link on the Aggregates by School page).
### Aggregate Detail

<table>
<thead>
<tr>
<th>Aggregate Area:</th>
<th>Stafford Loan - Subsidized</th>
<th>Aid Year: 2004-2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>School Code:</td>
<td>001316</td>
<td>Academic Year: 2005</td>
</tr>
<tr>
<td>Aggregate Level:</td>
<td>UO</td>
<td>Status: Internal</td>
</tr>
<tr>
<td>Aggregate Level:</td>
<td>UO</td>
<td>Status: Internal</td>
</tr>
</tbody>
</table>

| Expected Award: | 2,625.00 | Actual Award: | 0.00 |

#### Aggregate Loan Data

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Loan Application Seq Nbr:</td>
<td></td>
</tr>
<tr>
<td>Loan Destination Nbr:</td>
<td></td>
</tr>
<tr>
<td>Lender OE Code:</td>
<td></td>
</tr>
<tr>
<td>Loan Type:</td>
<td></td>
</tr>
<tr>
<td>Loan Period Start:</td>
<td></td>
</tr>
<tr>
<td>Loan Period End:</td>
<td></td>
</tr>
<tr>
<td>Borrower Based Academic Year</td>
<td></td>
</tr>
<tr>
<td>Gross Disbursed Amount:</td>
<td>$0</td>
</tr>
<tr>
<td>Total Loan Fees:</td>
<td>$0.00</td>
</tr>
<tr>
<td>Net Disbursed Amount:</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

The page displays aggregate area, aid year, academic year, school code, and status information about the award from the Aggregates by School page.

**Aggregate Level**

Displays the student’s academic level for which he or she received the aggregate amount.

**Expected Award**

Displays the aggregate amount offered to the student.

**Actual Award**

Displays the aggregate amount disbursed to the student.

### Aggregate Loan Data

The fields in this group box display loan processing information for loan awards that have at least been originated. However, this functionality is not currently supported, and these fields remain blank.

### Reviewing Aggregate Program Summary

Access the Aggregate Program Summary page (Financial Aid, Awards, Aggregates, View Aggregate Program Summary, Aggregate Program Summary).
## Aggregate Program Summary

### Program Totals by Aid Year

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>Undergrad Lifetime</th>
<th>Graduate Lifetime</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Limit</td>
<td>46,000.00</td>
<td>138,500.00</td>
</tr>
<tr>
<td>Used</td>
<td>9,000.00</td>
<td>9,000.00</td>
</tr>
<tr>
<td>Remaining</td>
<td>37,000.00</td>
<td>129,500.00</td>
</tr>
</tbody>
</table>

### Aggregate Areas for Program

<table>
<thead>
<tr>
<th>Aggregate Area</th>
<th>Totals by Aid Year</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Aid Year</td>
</tr>
<tr>
<td>Stafford</td>
<td>2005</td>
</tr>
<tr>
<td>Graduate Lifetime (Cumulative)</td>
<td>65,500.00</td>
</tr>
</tbody>
</table>

## Program Totals by Aid Year

### Aid Year

Indicates the aid year that corresponds to the displayed information. Use View All to view aggregate aid that was made in other aid years.

### Undergrad Lifetime (undergraduate lifetime)

Information in this row is for the student’s combined undergraduate NSLDS loan years (U0–U5) awards that are associated with the aggregate areas that are linked to this aggregate program.

### Graduate Lifetime

Information in this row is for the student’s combined graduate NSLDS loan years (G1–G4, P1–P4) awards that are associated with the aggregate areas that are linked to this aggregate program. The student’s undergraduate loan year awards may also be included in this row, depending on whether the aggregate area has cumulative or distinct lifetime limits.

## Aggregate Areas for Program

### Aggregate Areas for Program

Indicates the aid year that corresponds to the displayed information. Use View All to view aggregate area totals in other aid years.

### Undergrad Lifetime (undergraduate lifetime)

Information in this row is for the student’s undergraduate NSLDS loan years (U0–U5) and associated awards.
Graduate Lifetime (Cumulative)

Information in this row is for the student’s graduate NSLDS loan years (G1–G4, P1–P4) and associated awards. The student’s undergraduate loan year awards may also be included in this row, depending on whether the aggregate area has cumulative or distinct lifetime limits.

The student’s undergraduate amount of this aggregate aid is counted towards the graduate limit. If the undergraduate amount is 20,000 and the graduate amount is 40,000, then the student cannot receive more than 40,000 for this aggregate area.

When Distinct is displayed, the undergraduate and graduate limits are tracked separately. If the undergraduate amount is 20,000 and the graduate amount is 40,000, then the student can receive up to 60,000 for this aggregate area.

Reviewing Student Packaging Status by Date

The student’s financial aid award package as well as the information used to award a student can change over time. The As Of Status component enables you to view information about a student’s ISIR information and award package by a particular date in time. As new ISIR data is loaded, a student’s award package may change. Use the pages in the As Of Status component to review changes over time. This can be particularly important for explaining a reduced award to a student or for reviewing changes to student’s awards.

This section discusses how to:

- Review ISIR summary information by date.
- Review award summary by date.

Pages Used to Review Student Packaging Status by Date

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>As of ISIR Summary</td>
<td>AS_OF_ISIR_SUMMRY</td>
<td>Financial Aid, Awards, View by Date, As of ISIR Summary</td>
<td>Review a student’s ISIR summary detail as of a particular date, various database matches, and verification status.</td>
</tr>
<tr>
<td>As of Award Summary</td>
<td>AS_OF_AWRD_SUMMRY</td>
<td>Financial Aid, Awards, View by Date, As of Award Summary</td>
<td>Review award summary. Review a student’s financial aid package as of a particular date in time.</td>
</tr>
</tbody>
</table>

Reviewing ISIR Summary Information by Date

Access the As of ISIR Summary page (Financial Aid, Awards, View by Date, As of ISIR Summary).
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As of ISIR Summary page

As of Date

Enter the date that you want to review related to the student’s ISIR information. When you make an entry, the system displays the data that was used for the student as of the entered date.

Effective Sequence

Displays the number assigned to each effective-dated row that enables you to keep track of multiple rows with the same effective date.

The other fields on this page correspond to those on the ISIR Information Summary page.

See Also

lsfa, Preparing for Awarding and Packaging, Reviewing the Student’s Packaging Status, Reviewing the Packaging Status Summary Page

Reviewing Award Summary by Date

Access the As of Award Summary page (Financial Aid, Awards, View by Date, As of Award Summary).

As of Award Summary page

This page displays information for the entire aid year. The information on this page comes from the student award information and the authorization and disbursement processes.
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As of Date
Enter the date that you want to review related to the student’s award information. When you make an entry, the system displays information about the student’s awards as of the entered date.

Item Type
Displays the financial aid item type of the award.

Career
Displays the career associated with the award.

Reviewing Award Summary Information by Category

This section discusses how to review award summary information.

Pages Used to Review Award Summary Information by Category

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Category Totals</td>
<td>STDNT_AWRD_CATG</td>
<td>Financial Aid, Awards, View Award Category Summary, Award Category Totals</td>
<td>Review award summary information. View award totals by award category for the entire aid year.</td>
</tr>
<tr>
<td>Award Category Detail</td>
<td>STDNT_AWRD_CTG_DET</td>
<td>Click the Award Detail link on the Award Category Totals page.</td>
<td>View information about each award included in a category on the Award Category Totals page.</td>
</tr>
</tbody>
</table>

Reviewing Award Summary Information

Access the Award Category Totals page (Financial Aid, Awards, View Award Category Summary, Award Category Totals).

Award Category Totals

<table>
<thead>
<tr>
<th>Category</th>
<th>Award Count</th>
<th>Offer Total</th>
<th>Accept Total</th>
<th>Authorized Total</th>
<th>Disbursed Total</th>
<th>Award Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant</td>
<td>1</td>
<td>3,750.00</td>
<td>3,750.00</td>
<td>1,250.00</td>
<td>0.00</td>
<td>Award Detail</td>
</tr>
<tr>
<td>Total</td>
<td>1</td>
<td>3,750.00</td>
<td>3,750.00</td>
<td>1,250.00</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

Award Category Totals page

Category
Displays the type of financial aid award. An award’s category comes from the Financial Aid Type field on the FA Item Type 1 page. Each category for which the student has an award is shown.

Award Count
Displays the number of awards of this category awarded to the student.

Offer Total
Displays the total award amount offered for this category.

Accept Total
The total award amount accepted for this category.
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**Authorized Total**
Displays the total amount authorized for disbursement to the student for the category.

**Disbursed Total**
Displays the total amount disbursed to the student for the category.

**Award Detail**
Click this link to access the Award Category Detail page and view information about each award included in a category.

**Total**
Displays the total of all categories for each column.

---

**Reviewing Total Award Summary Information**

The Award Summary component enables you to review a student’s awards for the entire aid year or for a particular term, and also indicates whether each award has been authorized or disbursed.

This section discusses reviewing an annual award summary.

**Pages Used to Review Total Award Summary Information**

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Summary</td>
<td>STDNT_AWRD_INQUIRY</td>
<td>Financial Aid, Awards, View Term Award Summary, Award Summary</td>
<td>Review an annual award summary. View a student’s awards and the offered, accepted, authorized for disbursement, and disbursed amounts for each award.</td>
</tr>
<tr>
<td>Award Detail</td>
<td>AWARD_DETAIL_SEC</td>
<td>Click the Award Detail link on the Award Summary page.</td>
<td>View the disbursement plan and split code for an individual award, as well as details about a disbursement ID.</td>
</tr>
<tr>
<td>Award Term Summary</td>
<td>STDNT_AWRD_TERM</td>
<td>Financial Aid, Awards, View Term Award Summary, Award Term Summary</td>
<td>View a student’s awards by term. This is particularly useful when you are viewing awards for different careers for the terms.</td>
</tr>
</tbody>
</table>

---

**Reviewing an Annual Award Summary**

Access the Award Summary page (Financial Aid, Awards, View Term Award Summary, Award Summary).
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Award Summary page

The amounts on this page are for the entire aid year. Authorized and disbursed amounts may not be equal to the accepted amount if you have not disbursed all terms.

Award Detail

Click this link to access the Award Detail page and view the disbursement plan and split code for an individual award, as well as details about a disbursement ID.

TOTAL

Displays the totals for the student’s entire financial aid package.

Reviewing Anticipated Aid

When each financial aid item type is defined, one of the decisions that you make is whether this aid should be reflected on a student’s account in PeopleSoft Student Financials as anticipated aid before the actual disbursement of the aid. The pages that are discussed in this section enable you to view the awards that have been designated as anticipated aid. You can also use these pages to determine whether financial aid awards have been disbursed to students for any term in the aid year.

This section discusses how to:

• Review anticipated aid by term.
• Review anticipated aid by item type.

See Also

Isfa, Setting Up Packaging Basics, Defining Financial Aid Item Types, Defining Disbursement and Anticipated Aid

Pages Used to Review Anticipated Aid

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Definition Name</th>
<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anticipated Aid by Term</td>
<td>ANTIRIPTD_AID_SUMM</td>
<td>Financial Aid, Awards, View Anticipated Aid by Term, Anticipated Aid by Term</td>
<td>Review the anticipated aid for a student by term.</td>
</tr>
<tr>
<td>Anticipated Aid by Item Type</td>
<td>ANTICIPATED_AID</td>
<td>Financial Aid, Awards, View Anticipated Aid Item Type, Anticipated Aid by Item Type</td>
<td>Review the anticipated aid for a particular award financial aid item type.</td>
</tr>
</tbody>
</table>
Reviewing Anticipated Aid by Term

Access the Anticipated Aid by Term page (Financial Aid, Awards, View Anticipated Aid by Term, Anticipated Aid by Term).

Anticipated Aid by Term

<table>
<thead>
<tr>
<th>Student: Susan Forrester</th>
<th>ID: FAPK0130</th>
</tr>
</thead>
<tbody>
<tr>
<td>Aid Year: 2005</td>
<td>Financial Aid Year 2004-2005</td>
</tr>
<tr>
<td>Term: 0530</td>
<td>2004 Fall</td>
</tr>
</tbody>
</table>

**Activity** | **End I View All** | **First** | **1 of 2** | **Next** | **Last**
--- | --- | --- | --- | --- | ---

| Item Type: Federal SEOG Grant | Career: UGRD | Disbursement Plan: 01 | Disbursement ID: 01 |
| Date/Time: 10/15/2004 3:59:25PM | | | |
| **Apply Dt:** 10/15/2004 | **Expire Dt:** 11/14/2004 | **Net Award Amount:** 2,000.00 |

| Item Type: Federal Work-Study Program | Career: UGRD | Disbursement Plan: 01 | Disbursement ID: 01 |
| Date/Time: 10/15/2004 3:59:25PM | | | |
| **Apply Dt:** 10/15/2004 | **Expire Dt:** 11/14/2004 | **Net Award Amount:** 1,000.00 |

**Total Active Anticipated Aid:** 3,000.00 * = Expired

Anticipated Aid by Term page

Only financial aid item types that are designated as anticipated aid are displayed on this page. Use the scroll arrows to view additional anticipated aid awards for the term.

**Apply Dt** (apply date) Displays the date on which the award can be applied to the student’s account as anticipated aid. This date is based on the disbursement date of the disbursement ID.

**Expire Dt** (expire date) Displays the last date that the award is applied as anticipated aid to the student’s account. When this date has passed, the award does not count as anticipated aid for the term unless you change the expire date by modifying the Anticip Aid Expiration Days (anticipated aid expiration days) field on the FA Item Type 3 page.

**Net Award Amount** Displays the net amount to be disbursed to the student for the term for this financial aid item type. If this amount is zero, the award has been disbursed.

**Total Active Anticipated Aid** Displays the total amount of anticipated aid that is still active for the student for the term. This is the sum of the net award amounts for any financial aid item type that has not expired.

Reviewing Anticipated Aid by Item Type

Access the Anticipated Aid by Item Type page (Financial Aid, Awards, View Anticipated Aid Item Type, Anticipated Aid by Item Type).
Chapter 1

Reviewing Awards

Anticipated Aid by Item Type

Only financial aid item types that are designated as anticipated aid are displayed on this page.

**Show Active Aid Only**
Select this check box to view active anticipated aid awards only. Clear to view all anticipated aid awards (active and expired). When you first access this page, this check box is cleared.

**Career**
Displays the career that is associated with this disbursement plan. If the student is a multicareer student, use the scroll arrows to view other disbursement plan and career combinations for this financial aid item type.

**Disbursement ID**
Displays the individual disbursement ID for this anticipated aid award. The page displays award information by disbursement ID, instead of by term or aid year. Use the scroll arrows to view other disbursement IDs for this financial aid item type.

**As of Date/Time**
Displays the date and time when the anticipated aid was last updated. As changes are made, new rows are added with different dates and times. Use the scroll arrows to view additional changes to this award.

**Apply Dt (apply date)**
Displays the date on which the award can be applied to the student’s account as anticipated aid. This date is based on the disbursement date of the disbursement ID.

**Expire Dt (expire date)**
Displays the last date that the award is applied as anticipated aid to the student’s account. When this date has passed, the award does not count as anticipated aid for the term unless you change the expire date by modifying the Anticip Aid Expiration Days field on the FA Item Type 3 page.

**Net Award**
Displays the net amount to be disbursed to the student for the term for this financial aid item type. If this amount is zero, the award has been disbursed.
Expiring Anticipated Aid

This section discusses how to expire anticipated aid.

**Page Used to Expire Anticipated Aid**

<table>
<thead>
<tr>
<th>Page Name</th>
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<th>Navigation</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expire Anticipated Aid</td>
<td>ANTICIPTD_AID_EDIT</td>
<td>Financial Aid, Awards, Award Processing, Expire Anticipated Aid, Expire Anticipated Aid</td>
<td>Expire anticipated aid for any financial aid item type displayed. Also view the student’s anticipated aid for a particular term.</td>
</tr>
</tbody>
</table>

**Expiring Anticipated Aid**

Access the Expire Anticipated Aid page (Financial Aid, Awards, Award Processing, Expire Anticipated Aid, Expire Anticipated Aid).

**Expire Anticipated Aid page**

Click this button to set the expire date to the current date. This expires the anticipated aid for the financial aid item type. You must exit the page and access it again to have the expired asterisk appear next to the Net Award amount. After you click the button and exit the page and then access it again, this button is no longer available for this financial aid item type.

The other fields on this page correspond to those on the Anticipated Aid by Term page.

**See Also**

lsfa, Reviewing Awards, Reviewing Anticipated Aid
Reviewing Overaward Amounts

A report is available to help you identify whether any students are in an overaward situation and to review disbursement information for students who are in an overaward situation. An overaward situation occurs when the student receives financial aid for an award period that exceeds the student’s COA or need for that award period. This report lists students who have overaward amounts and contains information about their need and disbursements.

This section discusses how to generate the Overaward Report.

Page Used to Review Overaward Amounts

<table>
<thead>
<tr>
<th>Page Name</th>
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</tr>
</thead>
</table>

Generating the Overaward Report


**Overaward Report**

- **Run Control ID:** REPORT

**Report Parameters**

- **Institution:** PSUNV - PeopleSoft University
- **Aid Year:** 2005 - Financial Aid Year 2004-2005
- **Academic Career:** UGRD - Undergraduate
- **Award Period:** A - Academic
- **Pkg Method (Blank for Both):** FM - Federal Methodology

**Award Period**

Select the award period for which you want to view overaward amounts. Select A – Academic for the academic year or N – Non-Standard for summer and other terms that are not designated as academic terms.

**Pkg Method (packaging method)**

Indicate which packaging method should be used to determine whether a student has an overaward. Select FM – Federal Methodology to display overawards that exceed FM need or FM COA according to federal regulations, IM – Institutional Methodology to display overawards that exceed IM need or IM COA according to your institution’s rules, or leave the field blank to include both FM and IM overawards.
Note. The Overaward Report is a core report. If you want to use additional criteria when running this report, you can configure the report to suit your needs.